

Company Preferences - Purchasing

Last Modified on 11/13/2024 3:50 pm EST

Purchasing

Under the Purchasing company preference, you will be able to manage your promised dates, purchasing from preferred vendors and drop ship Purchase Orders.

Select the appropriate selection for your Purchasing preference:

- Enable multiple promise dates.
 - Limit items for purchasing to items that have the current vendor listed as a preferred vendor.
 - Include unapproved purchase orders in an item's summary.
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- After creating a Receiver for a drop ship PO, create a corresponding Ship Doc.
 - After setting a Receiver for a drop ship PO to Received Status, create a corresponding Ship Doc.

After creating a Receiver for a linked PO, create the corresponding Ship Doc OR allocate to the

- corresponding Work Order or Repair Order.
- After creating a Receiver for a linked PO, allocate to the corresponding Sales Order, Work Order or Repair Order.
- After changing the status of a Receiver to Received for a linked PO, allocate to the corresponding Sales Order, Work Order or Repair Order.
- When creating a ship doc or allocating a linked sales order, only do so if the Promise Date is less than or equal than today's date.

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- When creating a linked PO from a Sales Order, copy the Items description
 - By default use the vendor's primary contact for new purchase orders
 - Copy vendor notes to memo
 - When doing a linked PO or Linked WO, do not update the target doc's Cost field.
 - Change status to Sent after sending an email.

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- Default Location . The default location for all purchase orders. (Dropdown)

Reorder Analysis

- Include non-default vendors in Reorder Analysis when Vendor is not a filter.

- When the Evaluation Quantity is Below Reorder Point Plus Deficiency, also deduct Required.

Click **Save** when done.

Adding Multiple Promise Dates

- After the PO has been created, initiate the initial promise date on the PO creation page.

- To add extra promise dates, navigate to the line item editing page.
- Click the "Edit Line Item" button.

OrderTime

Home Sales Purchasing Production Repairs Warehouse Reports

Purchasing > Purchase Orders > Purchase Order

Created By Iorne Benolie 1/3/2024 12:50 PM Modified By Iorne Benolie 1/3/2024 12:54 PM

Purchase Order - 18 **EDIT** Create PDF Export Status Processing

General Bill Address Ship Address Summary

Vendor Uline Change No. 18 Date 1/3/2024 Promise Date 2/8/2024

COMPU-CENTER 1234 PINE SPRINGMAN, FLORIDA 00000 US

Total Amount 924.00

Items Details Memo & Internal Notes Custom Dependency Receivers Attachments Open Activities Activity History

Name/Number Search Item Scan

ITEM	DESCRIPTION	QUANTITY	UOM	COST	EXT.	ACTIONS
5-21025	18 x 18 x 10' Lightweight 32 ECT Corrugated Boxes 100 Boxes Per Bundle	4.00	Bu	231.00	924.00	Add Edit

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- Move to the Promise Dates tab.
- Click "Add" to insert additional promise dates.

OrderTime

Home Sales Purchasing Production Repairs Warehouse Reports

Purchasing > Purchase Orders > Purchase Order Line

Purchase Order Line for Purchase Order 18 Save Reset

Item 5-21025 Line No. 1

General Custom **Promise Dates**

Add

PROMISE DATE	QUANTITY	FILLED	OPEN QUANTITY	ACTIONS
2/17/2024	4	0	4.00	Add Edit

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Assign the amounts to the respective dates if need be thought clicking the editing button to the of the .

- Confirm the changes, and you should be all set.

Save Reset

Purchase Order Line for Purchase Order 18

Item S-21025

Line No. 1

General Custom Promise Dates

Add

PROMISE DATE

2/17/2024

ACTIONS

☑ ☒

Add/Edit Promise Date

General Custom

Quantity Promise Date

Save Close

- Recent Records
- 18
 - Uline
 - 17
 - 16
 - 348
 - Stanton Dahl
 - CHICKSOUPBATCH
 - 2
 - 4